Module 7

Chapter 1

Requesting Training

Chapter Overview

Introduction

This chapter explains the processes related to requesting training in Oracle Training Administration (OTA). It guides you through the steps to complete the **Training Request Form** (TRF), route it to the next approving official/office, and process the TRF and other actions in the Civilian Inbox.

Chapter Contents

See Also

In this Module:
- Overview
  - Stages of the Training Cycle
  - DoD Course Catalog
  - OPM Course Training Type Codes
  - Bulletin Board
  - Continued Service Agreement (CSA)
  - Roles and Responsibilities
- Chapter 2, Arranging Training
  - Defining an Activity
  - Scheduling an Event
  - Creating a Local Supplier for a Local Activity
- Chapter 4, Training Completions and Evaluations
  - Recording Completed Training in HR

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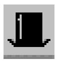
Completing the Training Request Form

Purpose

This section will guide you through the process for completing the Training Request Form (TFR).

Who Has Access



Components will determine the level of access to OTA. Employees may submit their own TRF to their manager/supervisor if they have been granted access to OTA by their Component. If the supervisor cannot locate the needed course in the course catalog, your Component will determine the process to be used. Components will also determine who the final approved TRF is routed to for information purposes, such as the initiator of the action or the supervisor.

Before You Begin

- You must be in an OTA Secure User view to access employee names to populate the TRF, to process actions in the Civilian Inbox, and to print DD Forms 1556/SF182.
- If you are using an Activity (course) **not** listed in the DoD catalog, you must first build a local Supplier before you build the Activity.
- Use the TRF to submit a request for enrollment in a Scheduled Event or to request training at a future date. The TRF is also the audit trail for approval of training and may be used as a survey tool.
- Data in the TRF auto-populates some of the data fields in the DD Form 1556 (see Module Overview). A DD Form 1556 cannot be printed unless a TRF has been completed. Data in the TRF does not flow to the **Enrollment** Window and subsequent windows.
- The TRF is available for individual requests only; however, you can easily make additional copies following the procedure in this chapter.
- If you do not complete the TRF, you can send it to your Civilian Inbox and return to it at a later time.
- A TRF is not required if you want to record an employee's self-development courses, or those completed at another agency.
- OTA does not have a Routing List like the RPA. A specific person's name from the LOV must be selected for routing purposes.
- Normally, the OTA Mngr/Sup or the OTA Org Trng Monitor will complete the TRF. In some cases, it may be completed by the OTA personnelist if that office is centrally contracting or conducting the Event.
- Employees can only route their TRFs, approval status buttons are grayed out. The same person cannot create and approve the TRF.
- If dates or other changes are made after the TRF is approved, changes are made on the Enrollment or Event Windows.
- Query the **Name** date field on a blank TRF (F8) to see previously completed TRFs and use the arrow key to scroll through and view each one.

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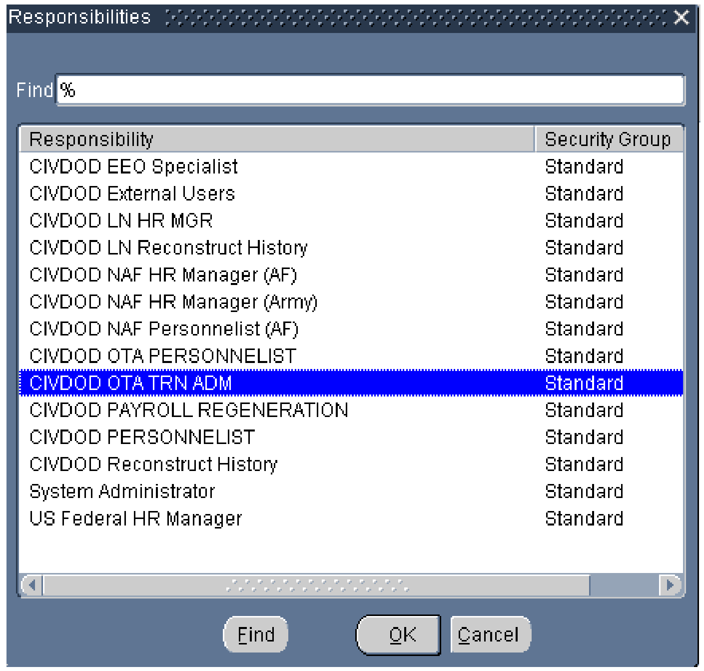
Completing the Training Request Form, Continued

Completing the Training Request Form

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

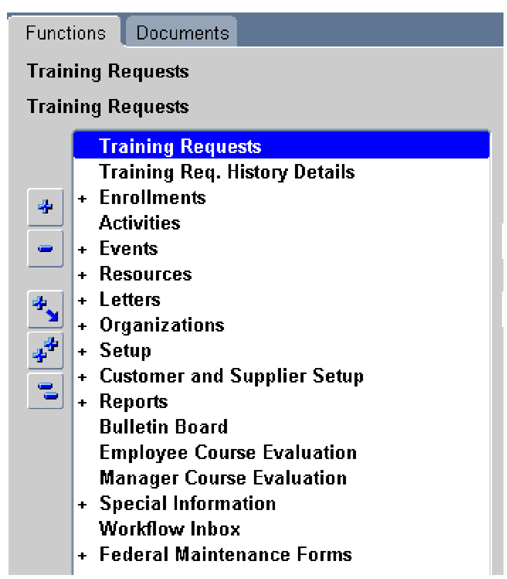
Click the responsibility that you have been assigned by your Component on the **Responsibilities** window. Click the **<OK>** button.



Note: See Roles and Responsibilities (Definitions and Access) in Module Overview.

</td></tr>
<tr><td>2</td><td>

The **Navigation List** opens. Click ***Training Requests*** and click **<Open>**.



</td></tr>
</table>

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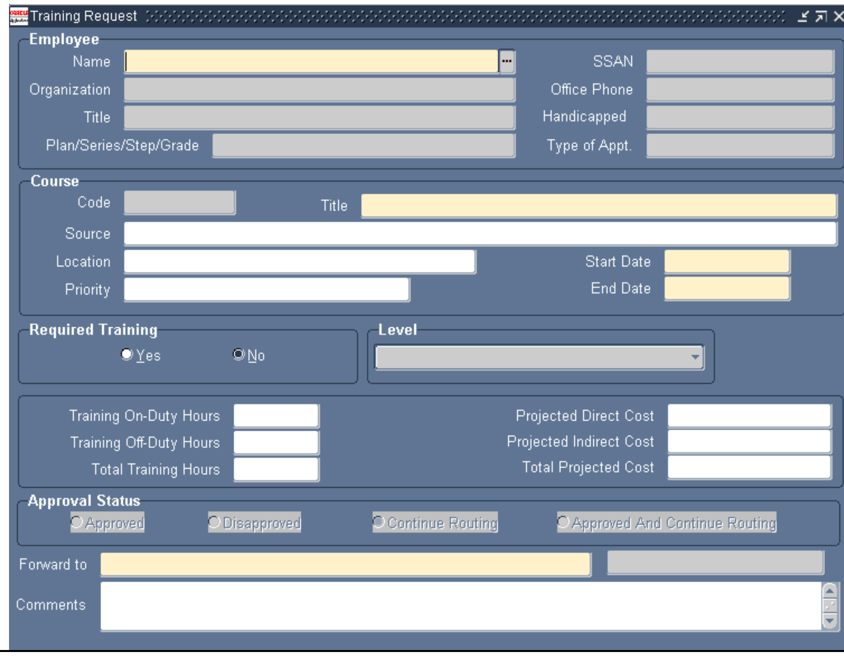
Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

Step	Action
3	The **Training Request Form** window opens. 
4	Click your cursor in each of the following data fields to complete

Data Field	Description/Action
Employee Region:	
Name	• Type using upper and lower case or use the LOV on the Toolbar. Required field. • **SSAN, Organization**, the remainder of the Employee Region auto-populates from the HR database.
Course Region:	
Code	Auto-populates with the OPM Training Type Codes when a Title is selected.
Title	Use the LOV to select from the DoD Course Catalog. Or you can query in the Title Field. Type in the partial title (e.g., %logistics%, press the Enter key, and the LOV that contains courses with “logistics” in the title opens.

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Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

Step	Action
4 (cont)	

Data Field/Region	Description/Action
Course Region: (cont)	
Source	Click the LOV to select or type in the code (e.g., G for National Guard, 4 for Private Vendor, etc). Optional field.
Location	Click the LOV to select the location or type in the first few letters of the location and press the Enter key. Optional field.
Priority	Type the number 1, 2, 3, 9 (unknown) or use the LOV. Optional field.
Start Date	Click the LOV and select the date. Required field.
End Date	Click the LOV and select the end date. Required field.
Required Training	Click the radio button for Yes or No. You should also update the HR Required Training if this is one of your Component's business rules.
Level	Select level of person submitting the TRF from the drop-down menu, e.g., Supervisor, Training Monitor. Required field.
Training On-Duty Hours	Type in the total duty hours. Press the [**Tab**] key. Optional field.
Training Off-Duty Hours	Type in total off-duty hours. Press the [Tab] key. Optional field.

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Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

Step	Action	
4 (cont)	**Data Field/Region**	**Description/Action**
	Total Training Hours	The Total Training Hours auto-populates.
	Projected Direct Cost	Type in Projected Direct Cost (tuition and fees). Press the [**Tab**] key.
	Projected Indirect Cost	Type in Projected Indirect Cost (travel and per diem). Press the [**Tab**] key.
	Total Projected Cost	The Total Projected Cost auto-populates.
	Approval Status Region:	Click one of the following buttons: **Note:** All selections to which you do not have access will be grayed out.
	Approved	This action stops the workflow process. The TRF is sent back to the requestor, but no further processing occurs. Typically, only the person completing the enrollment should click this action. Components can determine their specific policy. **No changes may be made to the TRF after this button is clicked**.
	Disapproved	This action stops the workflow process and sends a disapproved notification to the Civilian Inbox of the requestor. **No changes may be made to the TRF after this button is clicked**.
	.	

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Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(cont)</td><td>
<table>
<tr><th>Approval Status Region: (cont)</th><th></th></tr>
<tr><td>Continue Routing</td><td>Selection of this button allows the TRF to be changed or to be routed. As long as no approvals are given, changes may be made to the TRF.</td></tr>
<tr><td>Approved and Continue Routing</td><td>Selection of this button documents an approval level but does not stop the workflow process. A notification will flow to the requestor that the TRF is approved.</td></tr>
<tr><td>Forward to</td><td>Click the LOV to select name. Required field.</td></tr>
<tr><td>Comments</td><td>Type in comments up to 4 lines or 2000 characters.</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>Click Save on the Toolbar. TRF will go to inbox of person “Forwarded To.” This completes the supervisor’s required input. The Message Bar at the bottom of the window will indicate the status of the TRF, “Transaction complete. 1 records applied and saved.”</td></tr>
<tr><td>6
</td><td>Continue routing TRF until all approvals are received.

Note: If dates or other changes are made after the TRF is approved, make the changes on the Enrollment or Event Window.</td></tr>
</table>

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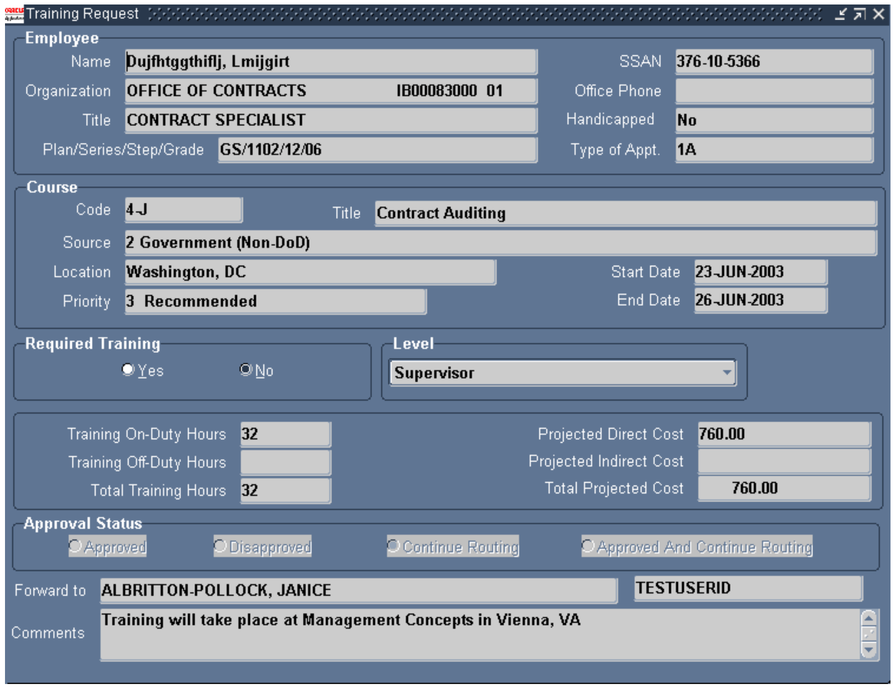
Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6
(cont)</td><td>Example of completed TRF:



</td></tr>
<tr><td>7</td><td>The TRF is forwarded to the Civilian Inbox of the person designated in the Forward to data field.</td></tr>
</table>

Printing the Training Request Form

Printing the TRF

Step	Action
1	**To print the TRF, click** <u>A</u>ction **on the Main Menu Bar and click** <u>P</u>rint**.** 
2	A **Print Setup** window opens. • Enter any necessary information on the **Print Setup** window, such as printer, size of the image, orientation, and click **<OK>**. • A second **Print Setup** window opens. Select any necessary information, such as number of copies, and click **<OK>**.
3	The **Forms** window opens, informing you the print capture is beginning and not to move or occlude the window you want to print. Click **<OK>**.
4	A second forms window opens to confirm the image capture is complete. Click **<OK>** and retrieve the page from your printer. **Note:** Use this same process to print any window in this application. See Chapter 6, Reports, in this module for additional instructions.
5	Exit the window and return to the **Navigation List**.

Completing Additional Training Request Forms

Completing Additional Training Request Forms

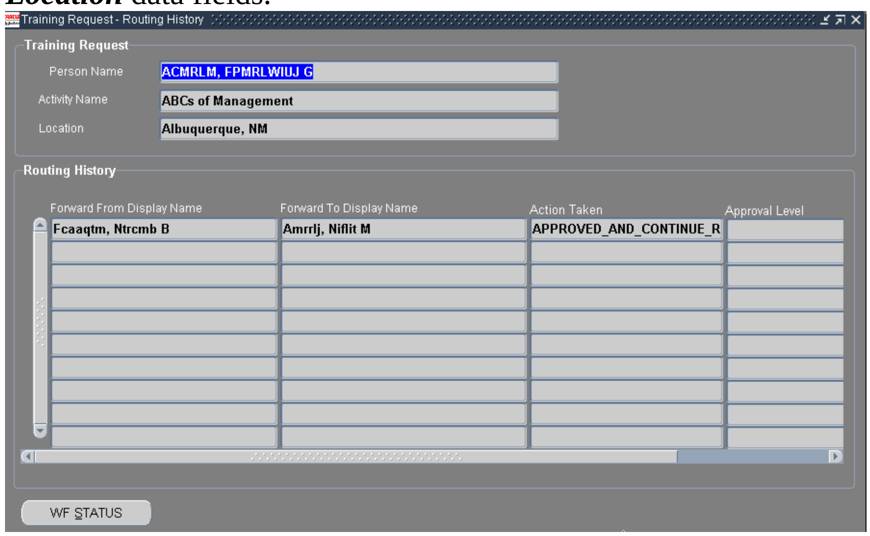
Follow this procedure with the TRF open that you wish to copy and add new names or if you wish to use the same name and add new course titles:

Step	Action
1	Select new record  on the Toolbar.
2	A blank **Training Request Form** opens.
3	With your cursor in the ***Name*** data field, select the employee name from LOV. The remaining data in the **Employee** Region auto-populates.
4	If the course title is the same as the previous TRF, place your cursor in the ***Title*** data field and press [F3]. This duplicates the previous entry. Continue positioning your cursor in each data field, and pressing [F3] until the form is completed. If desired training is not the same as the previous TRF, each data field must be completed separately.
5	Complete the Approval Status Region following the steps in this chapter.
6	Save the action and exit the window.

Viewing Training Request Routing History

Viewing the Routing History

Step	Action
1	**Navigation Path** → *Training Req. History Details* → **<Open>**.
2	The **Training Request Routing History** window opens. With your cursor in the ***Person Name*** data field, press F11 or **View** → **Query by Example** → **Enter** on the Main Menu Bar, type in the employee name or the first few letters of the last name, type the % sign, then press CTRL + F11 or **Query by Example** → **Run**. A similar query can be done in the ***Activity Name*** and ***Location*** data fields.



Data Field	Description
Forward From Display Name	Who initiated the TRF?
Forward To Display Name	Who the TRF was routed to?
Action Taken	Approved, etc.
Approval Level	Levels on the TRF.
Date Notification Sent	Includes time of day.

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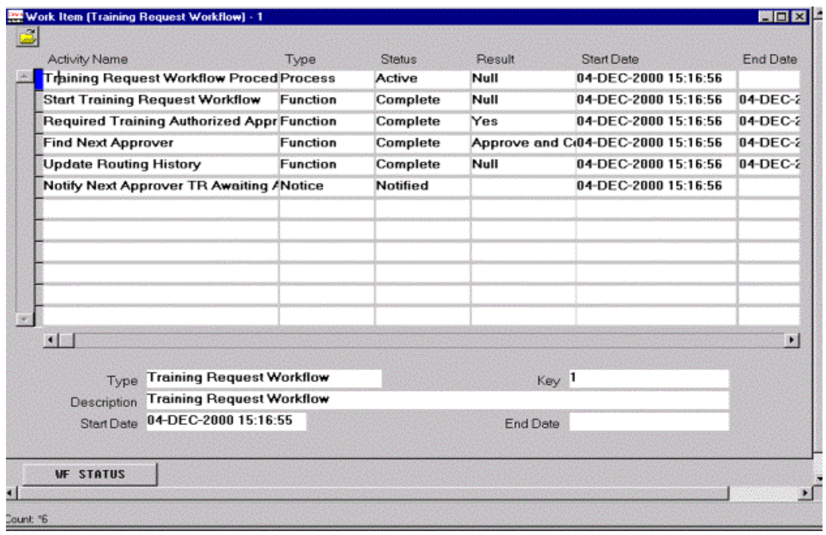
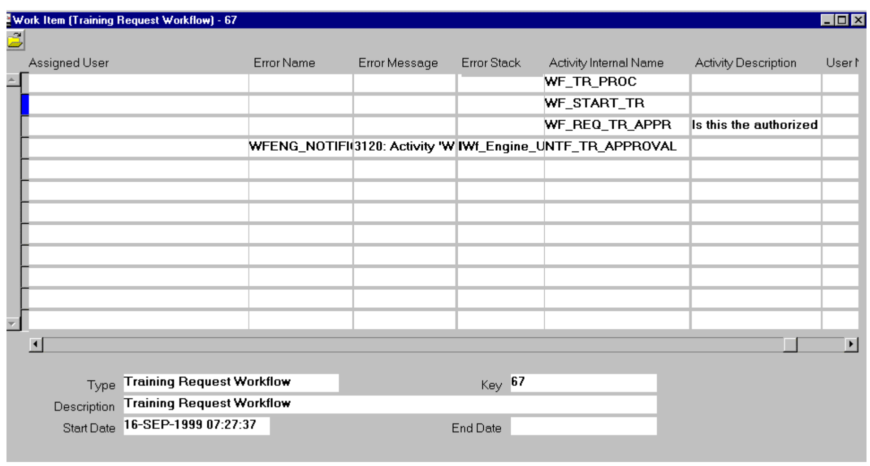
Viewing Training Request Routing History, Continued

Viewing the Routing History (continued)

Step	Action
4	Click **<WF STATUS>**. The **Work Item (Training Request Workflow)** window opens. As the button indicates, this gives you the status of your workflow processes.  Use the bottom scroll button to view the second half of window: 

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Viewing Training Request Routing History, Continued

Viewing the Routing History (continued)

Step	Action
4 (cont)	The Data Fields and Description from the Work Item Training Request Workflow Window are listed below:

Data Fields	Description
Activity Name	Step in the workflow process.
Type	Process, Function, Notice.
Status	Active, Completed, etc.
Result	Yes, Null, Approve, etc.
Start Date	Self-explanatory.
End Date	Self-explanatory.
Assigned User	Your name.
Error Name	Not used by DoD.
Error Message	Not used by DoD.
Error Stack	Not used by DoD.
Activity Internal Name	Name of QuickCode
Activity Description	Self-explanatory.
User Name	Your log-in name.

Processing OTA Actions in the WorkFlow Inbox

Purpose

This procedure guides you through the steps for accessing and processing OTA actions in the Workflow Inbox.

Definition

The **Workflow Inbox** opens notifications of actions initiated by you or routed to you. Everyone who has an inbox (e.g., supervisor, Training Official, Authorizing Official, Training Monitors, Training Managers, and personnelist) can process training actions.

As Training Requests are submitted, they will be forwarded to the appropriate **Workflow Inbox** to await further action.

Who Can Access the Civilian Inbox

Managers/supervisors, OTA Personnelist, Training Coordinators, and Training Monitors in the organization assigned to a **Workflow Inbox** with OTA responsibility. Employees do not yet have access to the modern DCPDS so they do not have a Workflow Inbox. Employee evaluations can be routed to the Training Monitor or Training Coordinator as determined by the Contact on the **Enrollment Details** window.

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Processing OTA Actions in the WorkFlow Inbox, Continued

Before You Begin

- Before a Training Request action will display in your **Workflow Inbox**, a completed Training Request Form (TRF) must have been completed and forwarded by an employee, manager/supervisor, Training Monitor or Training Coordinator to you.
- To process a TRF in your **Workflow Inbox**, you must have an OTA Secure User View. No names display on the LOV if you do not have an OTA Secure View.
- The TRF auto-populates part of the DD Form 1556. You must complete the TRF if you want to print the complete form.
- The OTA and Oracle HR Inboxes are different views of the same Inbox. You can see TRFs from either Inbox; however, you must access the OTA Inbox through a trainer role (Training Administrator, Manager, or OTA personnelist, Training Monitor, or Training Coordinator) before you can process actions. If you are in Oracle HR and try to process a TRF, you will get an error message.
- If you forward the TRF, it will not display in your inbox after you close and reopen it.

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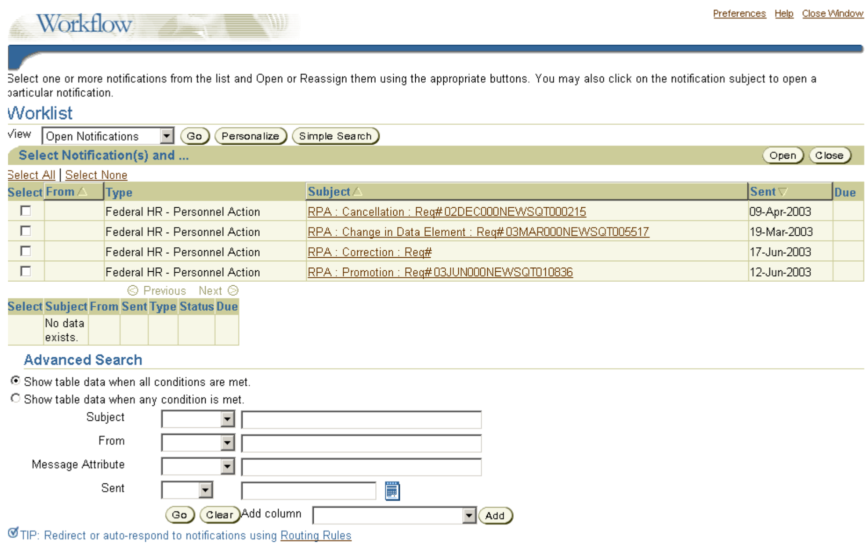
Processing OTA Actions in the WorkFlow Inbox, Continued

Accessing the Civilian Inbox

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation Path → Workflow <i>Inbox</i> → <Open>.</td></tr>
<tr><td>2</td><td>The Notifications Summary window opens. All actions sent to you (training and otherwise) display that relate to your user roles and responsibilities.


</td></tr>
</table>

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Processing OTA Actions in the WorkFlow Inbox, Continued

Accessing the Civilian Inbox (continued)

Step	Action
2 (cont)	

Data Fields/Buttons	Description/Action
Priority	System generated number (not the DoD course priority).
Due Date	Not applicable to the OTA actions.
To	Auto-populates.
Subject	Auto-populates.
Comment	Additional information on the request may be added in this 2000-character field.
Date Sent	Auto-populates.
Date Closed	Auto-populates when action is complete; however, it will not be visible until you deselect the Query Only Open Notifications Checkbox.
Notification ID	System generated number.
Status	Initialized with “Open.”
Attributes 1-20	Additional columns for local use.
Message Block	Gives brief details of the action to be worked.
Open Button	Click to view the expanded message.
Close Button	Click to close the action.
	Note: Checkbox is selected by default, so that only open actions display. Deselect the checkbox to turn off this option, and use it when you need to query closed actions for historical data

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Processing OTA Actions in the WorkFlow Inbox, Continued

Accessing the Notifications Window

Step	Action
1	Click **<Open>** on the **Notifications Summary** window to display the **Notifications** window.

Step	Action
2	From the **Notifications** window, you can process the **TRF** action by clicking **<Respond>** and displaying the TRF. To view the history of the **TRF,** click the **Routing History Form** Icon.

Data Fields and Buttons	Description/Action
Comment	You can add additional information in this data field. However, it stays with the request and does not go into history.
References	Opens the **Routing History Form** Icon to track the history of the request being processed.
Respond Taskflow Button	Opens the TRF.

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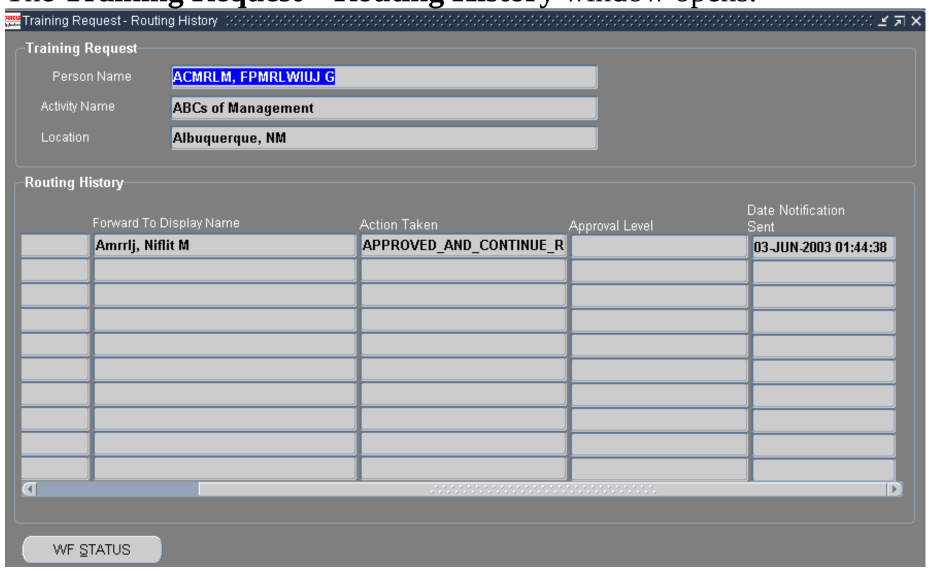
TRF Routing History

Training Request – Routing History

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Routing History Form Icon.</td></tr>
<tr><td>2</td><td>The Training Request – Routing History window opens.



Use the lower scroll bar to view remaining columns

<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Training Request Forwarded By</td><td>Name of Supervisor, Training Monitor, etc., who forwarded the TRF.</td></tr>
<tr><td>Action Taken</td><td>Self-explanatory – matches Approval Status Region of the TRF.</td></tr>
<tr><td>Level</td><td>Level of person who submitted the TRF (e.g., supervisor).</td></tr>
<tr><td>Forward to Name</td><td>The next person designated to take action.</td></tr>
<tr><td>Date Notification Sent</td><td>Self-explanatory.</td></tr>
</table>
</td></tr>
</table>

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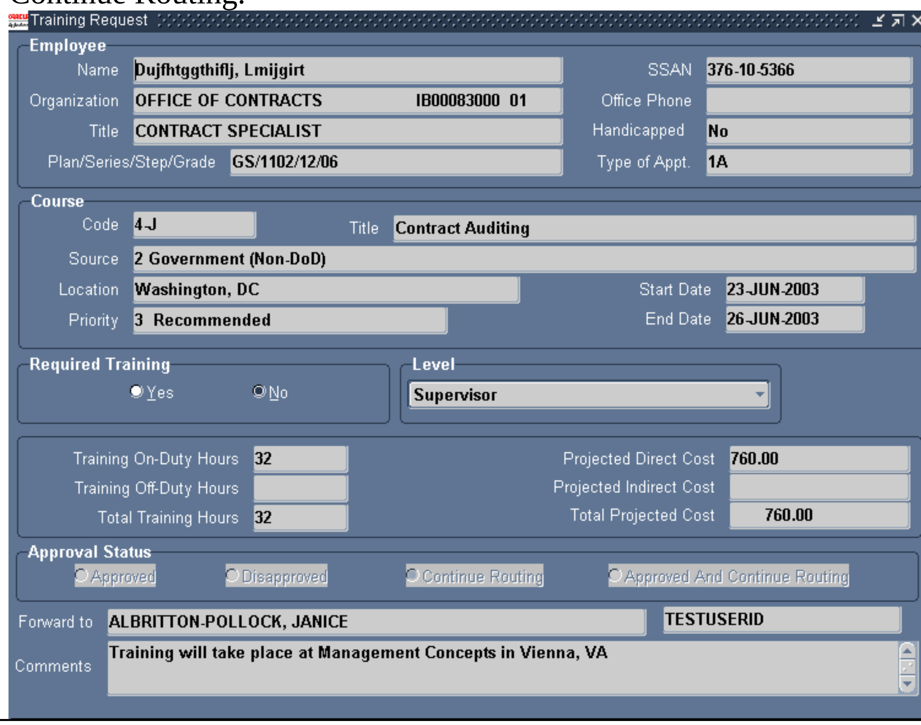
TRF Routing History, Continued

Training Request – Routing History (continued)

Step	Action
3	Once you have reviewed the columns, exit the window to return to the **Notifications** window.
4	Click **<Respond>** on the **Notifications** window.
5	The TRF opens. Take action as needed to Approve, Disapprove, or Continue Routing. 

Approving or Disapproving the TRF

Approving or Disapproving the TRF

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the appropriate button, as determined by your role, in the Approval Status Region of the TRF.

Note: See information on Approval Status in Chapter 1 of this module.</td></tr>
<tr><td>2</td><td>
<table>
<tr><th>If you <u>are</u> the final Approving Official:</th><th>If you are <u>not</u> the final Approving Official:</th></tr>
<tr><td>• Click <Approved> or <Disapproved>.</td><td>• Click <Continue Routing> or <Approved and Continue Routing>.</td></tr>
<tr><td>• Click the Save button on the Toolbar.</td><td>• Use the LOV to select the name to enter in the Forward to data field or type in the name.
• Click the Save button on the Toolbar.</td></tr>
</table>

Note: If you disapprove the request, you will not complete the next step.</td></tr>
<tr><td>3</td><td>Determine the next action to perform (Build a Supplier, Define an Activity, Build an Event, Enroll the Employee) and exit the windows.</td></tr>
</table>

Customizing Your Workflow Inbox

Customizing Your Inbox

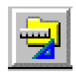
Use the **Folder Menu** and the **Folder Tools Palette** on the Toolbar to customize folders in your inbox for your use.

See Also

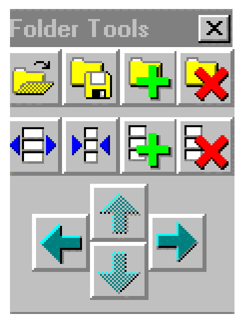
Module 1, Fundamentals of the Modern DCPDS
Chapter 7, Folders

Folder Tools Palette

For many of the **Folder** menu items, there is a corresponding button on the **Folder Tools Palette**, which performs the same function.

Click the **Folder Tools** button  on the Toolbar, which becomes enabled when you navigate to a folder block.

The **Folder Tools Palette** opens:
(See Module 1, Chapter 1, Folders, for a detailed description.)



Customizing Data in a Folder

You can customize the display layout using the **Folder** menu and **Folder Tools**. You can:

- Display only those data fields of interest to you.
- Instantly modify the column width, sequence, and labels of the data fields you want to display.
- Save your folder customizations for future use.
- Keep your folder customizations private or make them public for others to access.
- Make your customizations the default display for a folder.

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Customizing Your Workflow Inbox, Continued

Changing the Column Headings

You can change the data field labels (column headings) in a folder. This will not change the data field name in the database; it will simply change the label used in the folder's information display. You may find this feature helpful in making reports more understandable, if you choose to print or export folder data.

Creating a New Folder Definition

You can create and maintain a number of different folder definitions, based on unique variations in query criteria and display formats. For example, you could create a folder for Training that opens TRFs and another folder to display RPAs. There are two basic ways to create a **new** folder definition:

1. Create a new folder, customize it, and then save it.

   Or

2. Customize an existing folder and then perform the "Save As" function.

Both procedures will maintain the existing folder and create a new folder with your customizations. For detailed information on how to create folders, refer to Module 1, Chapter 7, Folders

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